



TRAVEL PRINTOUT

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Domestic Travel Continues Growth in 1990

"There were a record number of person-trips in 1990, even though travel did show a slight decline in October and November with an additional decline expected in December," said Suzanne Cook, executive director of the U.S. Travel Data Center, during the 1990 Review of Domestic Travel at the Travel Review Conference in Washington, D.C.

The fifth annual conference, co-sponsored by the Data Center, the Travel and Tourism Research Association (TTRA) and the United States Travel and Tourism Administration (USTTA), was held on February 4 at the Omni Shoreham Hotel and kicked off a week of travel associated events.

Growth in U.S. resident travel continued in 1990, with the volume of travel increasing 2 percent over 1989. There were 1.3 billion person-trips in 1990. (A person-trip is one person traveling 100 miles or more away from home).

The unstable economy and the middle east crisis did have an effect on the industry. The cost of travel in the U.S., as measured by the Data Center's Travel Price Index, increased 8.3 percent in 1990 over the previous year. In comparison, the consumer price index, a measure of all goods and services, showed a smaller 5.4 percent increase.

Summer vacation travel in 1990 showed an increase of 2 percent over 1989. The August 2 invasion of Kuwait did not seem to affect the volume of summer travel.

Dr. Cook told the 300 plus delegates that for the first time since 1986, August was the most popular month for summer vacation travel. "We speculate that the crisis may have induced people to travel more in August in anticipation that travel prices would increase in the near future," explained Cook.

Other highlights included:

- Vacation travel increased 2 percent in 1990, but as with total travel it began the year strong and then slowed

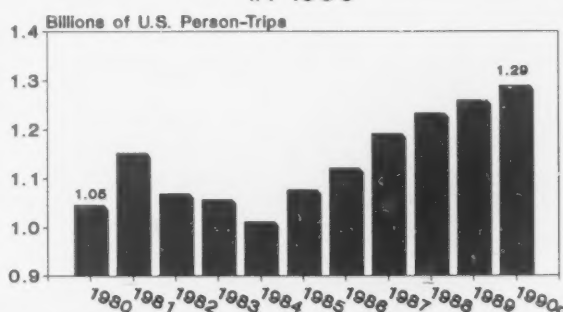
in May. In addition, vacation travel accounted for 70 percent of all travel in 1990.

- Business travel showed a decrease in 1990. The decrease is no surprise because of the record level of business travelers last year.

- The Southeast region of the United States was again the most popular destination for travelers in 1990. The West and Midwest were the second and third most popular, respectively.
- Automobile travel was again the most popular mode of transportation in 1990. In fact, auto/truck/rv accounted for 79 percent of all travel in 1990, an increase of 1 percentage point in share.

The 1990 domestic travel review also discussed different sectors of the industry. One sector that seems to have done very well in 1990 was the cruise lines. According to the Cruise Lines International Association, the number of North American passengers rose 12 percent over

RECORD 1.3 BILLION PERSON-TRIPS IN 1990



Source: U.S. Travel Data Center's National Travel Survey

the previous year.

The Data Center's 1990 Review of Domestic Travel also included an economic review and an evaluation of other sectors of the industry, such as the transportation, cruise line and lodging industries. The presentation also discusses trends and even some historical analysis of the travel industry.

Data Center members may purchase Dr. Cook's slide presentation for \$150, others may purchase the presentation for \$275. To order slides contact the Data Center at (202) 293-1040.

To order the complete conference proceedings, contact Mari Lou Wood, executive director of TTRA at (801) 581-3351. (All conference attendees will be receiving a complimentary copy).



Rising Hotel Costs Lead Travel Price Increase

Despite a 4 percent decrease in transportation prices, the largest decrease since 1986, the cost of overall travel in the United States rose 2.4 percent in January. The increase was largely due to a more than 10 percent jump in lodging prices, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 145.5 (1982 - 84 = 100) during January.

For comparison, the overall cost of goods and services Americans purchased as measured by the Consumer Price Index (CPI) increased to 134.6 in January.

Travel Price Index and Components

January 1991	Monthly % Change Dec. 1990 to Jan. 1991	Annual % Change Jan. 1990 to Jan. 1991
<u>TPI Component</u>	<u>Jan. 1991</u>	<u>Jan. 1991</u>
Transportation	-4.0	19.6
Airline Fares	0.6	21.9
Other Intercity Trans.	0.5	6.7
Intracity Public Trans.	0.5	4.2
Motor Fuel	-7.5	18.5
Lodging	10.6	21.4
Food and Beverages		
Away From Home	0.2	4.4
Entertainment	0.7	5.3
TRAVEL PRICE INDEX	2.4	12.8
CONSUMER PRICE INDEX	0.6	5.7

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

For the second consecutive month, motor fuel costs decreased. Even though motor fuel prices decreased 7.5 percent in January, the cost of motor fuel did increase more than 18 percent over the past 12 months.

Overall transportation costs decreased for the first time since July of last year. But during the last 12 months, transportation prices increased more than 19 percent.

Lodging and airline fares jumped more than 21 percent during the last 12 months. In addition, the TPI rose 13.0 percent and the CPI rose more than 6 percent over the past 12 months.

For Second Consecutive Month Overall Travel Decreases

For the second straight month, overall travel within the United States decreased. This past November overall travel dropped 1.3 percent below last November's level,

with more than 94 million person-trips taken by U.S. residents, according to the Data Center's latest National Travel Survey (NTS) results. (A person-trip measures each person traveling 100 miles or more away from home.)

Nearly every segment of the travel industry suffered declines in November, particularly air travel. Air travel, in terms of person-trips, decreased 18 percent below last November's levels. This decrease was mainly due to escalating air fares, which jumped more than 18 percent in November, according to the TPI.

Vacation travel contributed largely to the decrease in overall November travel. There was a 6.1 percent decrease in vacation travel this past November over last November with more than 62 million person-trips. It was the second consecutive month that vacation travel showed a decrease.

Even though vacation travel declined in November, travelers did increase the duration of their vacation. The average duration of a vacation this past November was 4.8 nights, compared to 4.3 nights in November 1989.

The average travel party size remained stable, with an average of less than 2 persons per trip in November. In addition to vacationers traveling for longer durations, they also traveled in larger groups. The average travel party size in November 1990 was 2.2 persons, increasing from 1.9 persons in November 1989.

One of the few bright spots in November travel was automobile travel. There were more than 75 million auto person-trips, an increase of 3 percent over November 1989.

Regional travel remained fairly consistent in November, as the Great Lakes Midwest and West regions both showed increases for the month, while the Northeast and Southeast experienced declines in traveler volumes.

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Rockefeller stresses importance of travel and tourism industry

"We need to give the travel and tourism industry the serious attention it deserves as our nation's largest export industry," said Sen. John Rockefeller (D-WV), on February 4 at the Travel Review Conference.

Rockefeller, who recently became the chairman of the Subcommittee on Foreign Commerce and Tourism, said that it was natural for him to make tourism a key part of his agenda in the Senate.

In July, Rockefeller held a hearing in the subcommittee on passenger facilitation, where suggestions were made to more efficiently process and document inbound travelers. He pointed out that several of the recommendations have become law.

"For me, travel and tourism is not an abstraction. As governor of West Virginia I made tourism development a top priority and it paid off handsomely," said Rockefeller.

Discoveries...

The older population, persons 65 years or older, numbered 31 million in 1989, representing more than 12 percent of the U.S. population, according to the American Association of Retired Person's (AARP) "A Profile of Older Americans: 1990."

The recently released brochure, which was prepared in

conjunction with the Administration on Aging (AoA) and the U.S. Department of Health and Human Resources, projected that the older population would climb to more than 65 million in the year 2030, representing 22 percent of the U.S. population.

According to the brochure, a child born in 1988 could expect to live 74.9 years, about 28 years longer than a child born in 1900. The major part of this increase occurred because of reduced death rates for children and young adults.

"A Profile of Older Americans: 1990," has statistics, maps, charts and graphs under a variety of headings. To receive a complimentary copy of the brochure, send your name and address on a postcard to: A Profile of Older Americans: 1990, AARP Fulfillment, 1909 K Street, N.W., Washington, D.C. 20049. Allow 6-8 weeks for delivery.

To submit your company's travel research projects, send a brief description of the report, including the price, address, and contact name, to Scott Dring, U.S. Travel Data Center, 1133 21st Street, Washington, D.C. 20036.

Louisiana Vaults into STO Budget's Top Ten List

Louisiana ranked tenth in 1990-91 projected state travel office budgets, increasing its budget more than 81 percent with more than \$9.5 million, according to the Data Center's 1990-91 Survey of State Travel Offices.

The 18th annual report, which provides information of state travel office budgets by category, advertising, promotion and research programs, listed Illinois as having the highest projected state travel office budget in fiscal year 1990-91.

States are planning to spend nearly \$356 million for travel and tourism development and promotion in fiscal year 1990-91, a more than 5 percent increase from last year's total.

The 1990-91 Survey of State Travel Offices is based upon questionnaires completed by representatives of all the state travel offices, and the District of Columbia. The report is available for \$75 and can be purchased by contacting the Data Center at (202) 293-1040.

USTTA Releases Third Quarter Report

The United States Travel and Tourism Administration (USTTA) has released its third quarter 1990 *In-Flight Survey of International Air Travelers* of overseas and Mexican air visitors to the United States.

The report, which will be featured in next month's *Data Center Insider*, can be purchased for \$175.

Region	DEC 1990 visits	% Change from DEC 1989	Year to Date % Change 1990/89*
NEW ENGLAND	374,095	47.6%	2.1%
MIDDLE ATLANTIC	1,070,786	19.1	.7
SOUTH ATLANTIC	3,773,764	37.6	3.1
EAST SOUTH CENT.	834,264	10.3	3.1
EAST NORTH CENT.	179,984	19.8	-2
WEST NORTH CENT.	173,903	4.4	.1
WEST SOUTH CENT.	353,306	4.7	-6.5
MOUNTAIN	1,151,177	-9.7	1.9
PACIFIC	2,253,242	-3.7	-1.9
TOTAL	10,164,521	13.9	1.0

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., S.D., S.W. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

* NOTE: As of December 1990, National Park data will come directly from the National Park Service. This improvement will enable the Data Center to publish more accurate data.

Current Travel Indicators - 1990/91

Month	Value	Units	Percent Change			
			Last Month	Year Ago	Year To Date	
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)...	Nov	\$4,688	million	-16.3	5.2	6.8
	Dec	\$3,722	million	-20.6	2.1	6.5
Eating and Drinking Places(2).....	Dec	\$15,286	million	0.1	5.6	5.1
	Jan	\$15,410	million	0.8	4.2	4.2
Gasoline Service Stations(2).....	Dec	\$11,924	million	-1.7	19.6	11.5
	Jan	\$11,651	million	-2.3	15.9	15.9
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3).....	Nov	62.4	percent	-1.3	-4.4	0.2
	Dec	62.1	percent	-0.5	-4.3	-0.2
Real Demand for Commercial Lodging(4).....	Nov	57.5	million	-14.8	0.1	3.3
	Dec	47.8	million	-16.9	1.0	3.2
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles.....	Jan	25.0	billion	-3.7	-1.3	-1.3
Int'l Revenue Passenger-Miles.....	Jan	8.1	billion	-8.9	-3.3	-3.3
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles.....	Dec	40.4	billion	-4.0	1.7	3.0
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles.....	Dec	508.8	million	3.4	3.7	3.6
Travel Price Index (1982 - 84 = 100) (8).....						
	Jan	145.5		2.4	12.8	12.8
U.S. Resident Travel						
Total Person-trips(9).....	Nov	94.6	million	-1.8	-1.3	2.5
	Dec	93.6	million	-1.1	-13.7	1.1
Vacation Person-trips(9).....	Nov	62.1	million	-3.1	-6.1	2.6
	Dec	63.2	million	1.8	-19.1	0.6
Total Person-nights(10).....	Nov	387.9	million	8.9	n/a	n/a
	Dec	402.5	million	3.8	n/a	n/a
Vacation Person-nights(10).....	Nov	298.1	million	13.4	n/a	n/a
	Dec	322.3	million	8.1	n/a	n/a
Visitor Volume at National Park Service Areas (11)						
Recreation Visits.....	Dec	10,164,521		-29.4	13.9	1.0
Overnight Stays.....	Dec	347,621		-48.7	-11.6	0.7
Foreign Arrivals to the U.S.						
From Overseas(12).....	Oct	1,266,441		-7.1	11.0	6.2
From Canada(13).....	Dec	1,031,627		-15.2	14.7	13.3
From Mexico(12).....	Oct	111,246		10.3	20.9	7.4
U.S. Citizen Departures						
To Overseas(12).....	Sept	1,346,400		-16.5	8.3	9.3
To Canada(13).....	Dec	547,139		-6.2	0.7	1.3
Domestic Demand for Gasoline						
Barrels/Day(14).....	Dec	6,920	thousands	-4.6	-6.6	-2.1

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary, revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted, 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary, U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary, unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary. Source: U.S. Department of Energy.

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